TOTAL SYSTEM DEVELOPMENT
PROPOSAL PHASE GUIDELINES

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1. GENERAL

1.01 A proposal is the project initiation phase. The purpose of the Proposal Phase is to describe the need for a system development project. Typically, the phase is performed by the sponsoring or user organization though Information Systems Organization personnel may be involved on a consulting basis. A project team is not usually formed for this phase except in special cases (eg, very large projects, interdepartmental projects, etc).

1.02 Whenever this section is reissued, the reason(s) for reissue will be included in this paragraph.

1.03 This section is a guideline. It provides expanded information in support of the concepts of Total System Development specified in Section 007-220-300*, Total System Development — Milestones.

2. PROJECT INITIATION REQUEST

2.01 The major activity of the Proposal Phase is the development of the Project Initiation Request which should provide sufficient information to allow management to evaluate the potential benefit of the system being proposed. The request should contain the following information:

(a) Description of current situation

(b) Nature and scope of proposed effort

(c) Estimated benefits of new system

(d) Estimated costs of new system

(e) Relationship of effort to long-range plans

(f) Administrative information.

2.02 ***Description of Current Situation:*** The current environment and method of performing functions should be briefly described. The operational problems being encountered or the improvements that are desired should be identified. If previous studies have been conducted, they should be described and referenced.

2.03 ***Nature and Scope of Proposed Effort:*** The functional areas to be included in the proposed development effort should be defined. If a specific approach is recommended, it should be described as fully as possible. These approaches are:

(a) To develop a new system

(b) To improve or redesign an existing system

(c) To install a system available elsewhere (centrally developed, available from another company, etc).

Other organizations that would use the system or be impacted by it should also be identified.

2.04 ***Estimated Benefits of New System:*** The potential benefits of the proposed system, both economic and noneconomic, must be stated. The projected magnitude of each benefit, however, can probably be estimated only in a rough fashion at this early point. Even so, the benefits statement should provide a fairly clear picture of the system's potential value to the user.

2.05 ***Estimated Costs of New System:*** Because of the lack of factual data, it is not al-

* Check Divisional Index 007 for availability.

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ways possible to estimate development or operational costs during the Proposal Phase. If any cost data are available, they should definitely be included in the Project Initiation Request. If, for example, a specific vendor product or service of known price is recommended, an identical or similar system is installed elsewhere. The nature of the request is very definitive. Some reasonable cost estimates may be possible.

2.06 ***Relationship of Effort to Long-Range Plans:*** The sponsoring organization for the project should describe how the proposed effort relates to the overall long-range application plan or operations plan, eg, Regulates Market Operations Plan (REGMOP). The effort may be a primary component of the plan, or it may be only an interim step. If the latter, the extent of usefulness of the interim system and its intended life-span should be described. The sponsor should also assign a priority to the effort and provide sufficient information to substantiate that priority.

2.07 ***Administrative Information:*** Finally, the sponsor should specify which administrative mechanism should be used for evaluation of the request and should designate a specific individual to represent the sponsoring or user organization in further negotiations.

3. END-OF-PHASE ACTIVITIES

3.01 The Project Initiation Request is submitted to the appropriate project approval entity to obtain authorization to perform the Feasibility Phase. Most organizations have project approval authorities at multiple levels. The necessary level of approval depends upon the dollar amount for either system development or operation.

3.02 The project approval entity should evaluate the request in terms of a number of factors.

(a) Does an information systems solution appear to be the best solution to the problem?

(b) Does the proposed system appear to be technically and operationally feasible?

(c) Are the projected benefits of the system sufficiently attractive to warrant completion of the Feasibility Phase?

(d) Are resources available to assign to the effort?

3.03 Once the approval for the Feasibility Phase is granted, a Project Manager is assigned, and a project team is formed. Notice should be forwarded to User and Information Systems Organization (ISO) Planning so that project requirements can be incorporated into their plans. Interdepartmental/ Segment Approval and Control must also be notified so that project identification, funding, and tracking can be initiated.

4. REFERENCES

4.01 The following sections will provide additional information relevant to the Proposal Phase.

SECTION	TITLE
007-200-310	Functional Roles in a Systems Environment
007-208-310	Project Management
007-220-300	Total System Development — Milestones
007-227-310	Developmental Documentation Specifications.